



Sessions 3-5:

VA TMS Training for Domain Managers, Learning Managers, and Item Managers

VA TMS Administrators
Role-Based Training

Virtual Instructor-Led Training

Participant Guide

April 2014

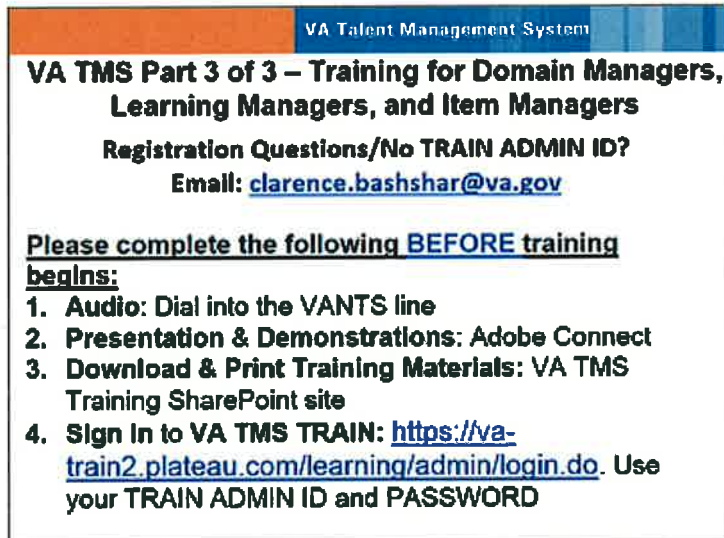
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4.0 Training Content: Session 5 (Part 3 of 3)

4.1 Welcome



VA Talent Management System

VA TMS Part 3 of 3 – Training for Domain Managers, Learning Managers, and Item Managers

Registration Questions/No TRAIN ADMIN ID?
Email: clarence.bashshar@va.gov

Please complete the following BEFORE training begins:

1. **Audio:** Dial into the VANTS line
2. **Presentation & Demonstrations:** Adobe Connect
3. **Download & Print Training Materials:** VA TMS Training SharePoint site
4. **Sign In to VA TMS TRAIN:** <https://va-train2.plateau.com/learning/admin/login.do>. Use your TRAIN ADMIN ID and PASSWORD

Notes:

Slide 1: Session Preparation



VA Talent Management System

VA TMS Administrators Role-Based Training:
Part 3 of 3 – VA TMS Training for Domain Managers, Learning Managers, and Item Managers



 **ADVANCE**
TRANSFORMING POTENTIAL INTO PERFORMANCE

An HNSA initiative to invest in people development, talent acquisition and workforce engagement for the delivery of high-quality healthcare. Benefits and other services to enhance and free families.



Notes:

Slide 2: VA TMS Administrators Role-Based Training:
Part 3 of 3

Learning Needs Management 3 of 3 VA Talent Management System

Session Agenda

- Welcome and Introductions
- Lesson 1: Manual Learning Assignments
- Lesson 2: Record Learning Events
- Question and Answer

3

Notes:

Slide 3: Session Agenda

Learning Needs Management 3 of 3 VA Talent Management System

Session Objectives

After completing this session, you will be able to:

- Assign learning using manual methods
- Record learning events in the VA TMS
- Use other tools in VA TMS, such as Record Learning-Multiple Tool and the Learning Event Editor
- Locate and successfully use the Learning History and Certificate of Completion areas in the VA TMS

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Notes:

Slide 4: Session Objectives

Learning Needs Management 3 of 3

VA Talent Management System

Introductions

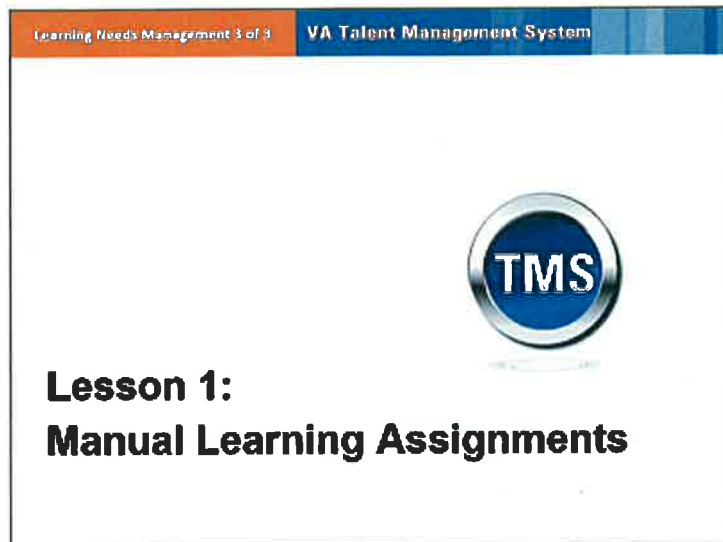
- Welcome and Introductions
- Lesson 1: Manual Learning Assignments
- Lesson 2: Record Learning Events
- Question and Answer

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Notes:

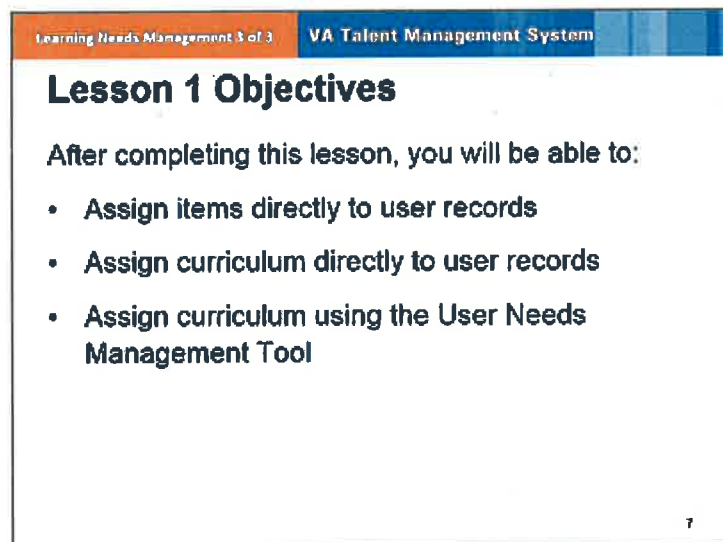
Slide 5: Introductions

4.2 Lesson 1: Manual Learning Assignments



Notes:

Slide 6: Lesson 1: Manual Learning Assignments



Notes:

Slide 7: Lesson 1 Objectives

Learning Needs Management 3 of 3 VA Talent Management System

Assigning Learning

Users can be assigned to curriculum in two ways:

1. Manual
 - By selecting the user and assigning curriculum
2. Automated
 - Using Assignment Profiles

We are focusing on Manual methods in this session.

3

Notes:


Slide 8: Assigning Learning

Learning Needs Management 3 of 3 VA Talent Management System

Manually Assigning Learning


From To-Do List tab:

Allows Admin to add items directly to User's To-Do List



From User Needs Management Tool:

Opens User Needs Management Tool



Notes:

Slide 9: Manually Assigning Learning



Notes:

Slide 10: Demonstration: Assigning an Item



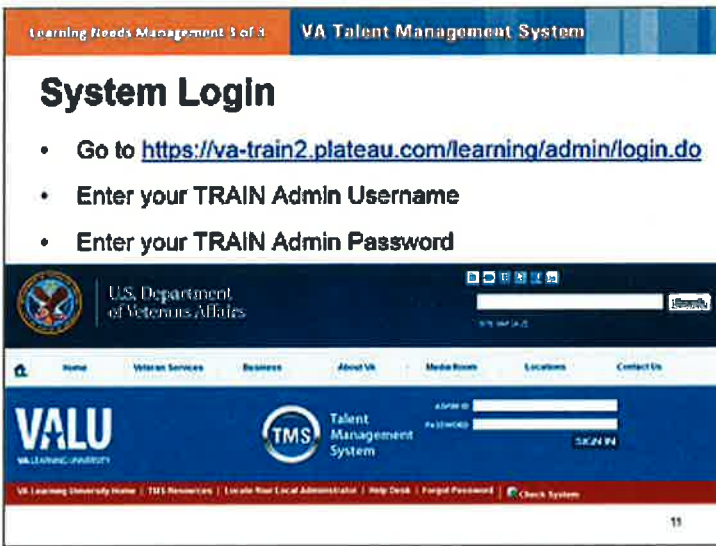
Demonstration: Assigning an Item

To assign items directly to a user record:

1. Navigate to **Users> Users**.
2. Enter criteria to search for the user to whom you will assign the item.
3. Select **Search**.
4. Select the **user ID** link.
5. Select the **To-Do List** tab in the Related area.
6. Select **Add New To-Do List**.
7. Enter criteria to search for the item to assign.
8. Select **Search**.
9. Select the **Add** checkbox next to the item(s) to add.
10. Select **Add**.
11. Locate the item in the displayed list.
12. Add/edit the Required Date using the calendar icon.
13. Select an assignment type from the drop-down menu.
14. Select **Save**.

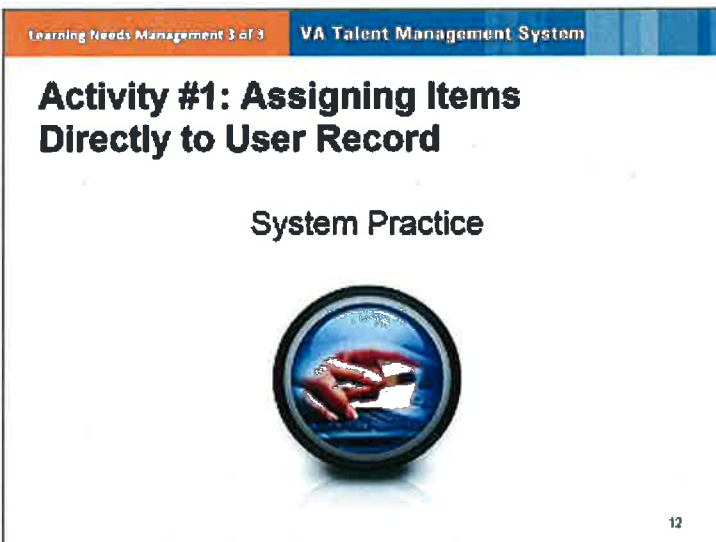


The Job Aid: Assign Learning via Basic Methods is available in the VA TMS.



Notes:

Slide 11: System Login



Notes:

Slide 12: Activity #1: Assigning Items Directly to User
Record



Activity #1: Assigning Items Directly to User Record

1. Navigate to **Users> Users**.
2. Enter criteria to search for the user to whom you will assign the item.
3. Select **Search**.
4. Select the **user ID** link.
5. Select the **To-Do List** tab in the Related area.
6. Select **Add New To-Do List**.
7. Enter criteria to search for the item to assign.
8. Select **Search**.
9. Select the **Add** checkbox next to the item(s) to add.
10. Select **Add**.
11. Locate the item in the displayed list.
12. Add/edit the Required Date using the calendar icon.
13. Select an assignment type from the drop-down menu.
14. Select **Save**.

Learning Needs Management 3 of 4 VA Talent Management System

Assign a Curriculum


When you need to assign curriculum to one user, the easiest way to accomplish this is by the Curricula tab from the Related area of a User Record.

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Notes:

Slide 13: Assign a Curriculum

VA Talent Management System



Demonstration: Add New Curricula

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Notes:

Slide 14: Demonstration: Add New Curricula



Demonstration: Add New Curricula

To assign curricula directly to the user record:

1. Navigate to **Users > Users**.
2. Enter criteria to search for the user to add the curriculum.
3. Select **Search**.
4. Select the **user ID** link.
5. Select the **Curricula** tab from the Related area.
6. Select **Add New Curricula**.
7. Enter criteria to search for the curriculum to add.
8. Select **Search**.
9. Select the **Add** checkbox next to the curricula to add.
10. Select **Add**.
11. Verify the curricula are added to the user record.
12. Select the **To-Do List** tab from the Related area.
13. View the items that are added to the user's To-Do List based on the curricula added.




The Job Aid: Assign Learning via Basic Methods is available in the VA TMS.

Learning Needs Management 3 of 3 VA Talent Management System

Activity #2: Assigning Curricula Directly to User Record

System Practice



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Notes:

Slide 15: Activity #2: Assigning Curricula Directly to
User Record




Activity #2: Assigning Curricula Directly to User Record

1. Navigate to **Users > Users**.
2. Enter criteria to search for the user to add the curriculum.
3. Select **Search**.
4. Select the **user ID** link.
5. Select the **Curricula** tab from the Related area.
6. Select **Add New Curricula**.
7. Enter criteria to search for the curriculum to add.
8. Select **Search**.
9. Select the **Add** checkbox next to the curricula to add.
10. Select **Add**.
11. Verify the curricula are added to the user record.
12. Select the **To-Do List** tab from the Related area.
13. View the items that are added to the user's To-Do List based on the curricula added.

Learning Needs Management 3 of 3 VA Talent Management System

Batch Learning Assignments

For one-time manual batch assignment of one or more items or curricula to a group of users, use the User Needs Management tool.




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Notes:

Slide 16: Batch Learning Assignments

Learning Needs Management 3 of 3 VA Talent Management System



Demonstration: Assigning Curriculum Using User Needs Management Tool

Notes:

Slide 17: Demonstration: Assigning Curriculum Using
User Needs Management Tool



Demonstration: Assigning Curriculum Using User Needs Management Tool

To Assign Curriculum, use the User Needs Management Tool which is a 3-step process: (1) Selecting the Management Action; (2) Adding Users, and (3) Adding Curricula.

1. Navigate to **Users > Tools > User Needs Mgmt.**

NOTE: You can also access the tool from the **Quick Links** section of the Home page, or by selecting the **Assign Learning Needs** link from the Actions area of the user record.


2. Select the **Add Curricula** radio button and select **Next**.
3. Select the **add one or more from list** link.
4. Enter criteria to search for the users to have the curriculum added.
5. Select **Search**.
6. Select the **Add** checkboxes next to each user who needs the curriculum.
7. Select **Add** and select **Next**.
8. Select the **add one or more from list** link.
9. Enter criteria to search for the curriculum to add.
10. Select **Search**.
11. Select the **Add** checkbox next to the curricula to add.
12. Select **Add**.
13. Select **Next**. Note the assign date.
14. Select **Next**.
15. Select **Run Job Now**.
16. Finished screen displays that you have successfully added the curricula.



The Job Aid: Assign Learning via Basic Methods is available in the VA TMS.

Learning Needs Management 3 of 3 VA Talent Management System

**Activity #3: Assigning Curriculum
Using the User Needs
Management Tool**
System Practice



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Notes:

Slide 18: Activity #3: Assigning Curriculum Using the
User Needs Management Tool



Activity #3: Assigning Curricula Using the User Needs Management Tool

1. Navigate to **Users > Tools > User Needs Mgmt.**

NOTE: You can also access the tool from the **Quick Links** section of the Home page, or by selecting the **Assign Learning Needs** link from the Actions area of the user record.


2. Select the **Add Curricula** radio button and select **Next**.
3. Select the **add one or more from list** link.
4. Enter criteria to search for the users to have the curriculum added.
5. Select **Search**.
6. Select the **Add** checkboxes next to each user who needs the curriculum.
7. Select **Add** and select **Next**.
8. Select the **add one or more from list** link.
9. Enter criteria to search for the curriculum to add.
10. Select **Search**.
11. Select the **Add** checkbox next to the curricula to add.
12. Select **Add**.
13. Select **Next**. Note the assign date.
14. Select **Next**.
15. Select **Run Job Now**.
16. Finished screen displays that you have successfully added the curricula.

Learning Needs Management 3 of 3 VA Talent Management System

Knowledge Check

Administrators can assign multiple curricula to a user from within a user record.

- a) True
- b) False



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Notes:


Slide 19: Knowledge Check

Learning Needs Management 3 of 3 VA Talent Management System

Knowledge Check

Administrators can change a user's required-by date for an item from the Learning Plan tab from the Related area of a user's record.

- a) True
- b) False



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Notes:

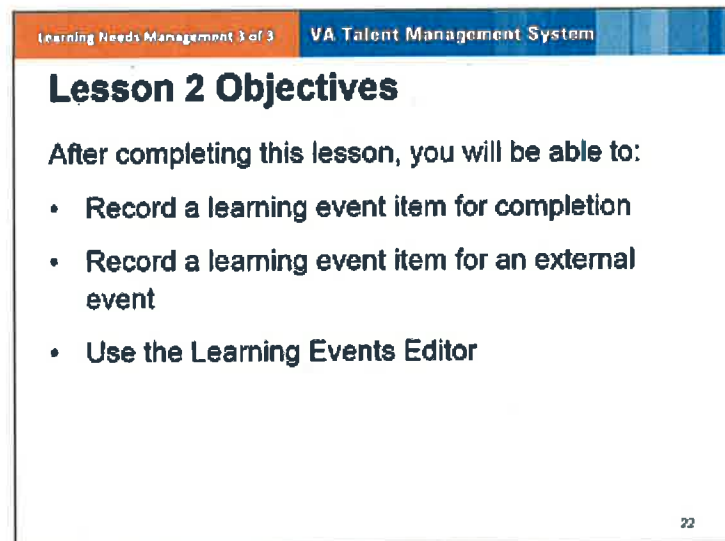
Slide 20: Knowledge Check

4.3 Lesson 2: Record Learning Events



Notes:

Slide 21: Lesson 2: Record Learning Events



Notes:

Slide 22: Lesson 2 Objectives

Learning Needs Management 3 of 3 VA Talent Management System

Learning Events

A learning event is the record of:

- A completed item
- An unsuccessful attempt to complete an item
- Attendance or completion of any external event that is considered important enough to document but not related directly to learning needs

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Notes:

Slide 23: Learning Events

Learning Needs Management 3 of 3 VA Talent Management System

Record Learning Events

You can record learning for:

- Item-Based Events, including scheduled offerings
- External Events

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Notes:

Slide 24: Record Learning Events

Learning Needs Management 3 of 3 VA Talent Management System

Item-Based Events

- Items are the primary events found in the list of learning events for users
- Includes items created as scheduled offerings
- All items may have a learning event recorded against them for any user

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Notes:

Slide 25: Item-Based Events

Learning Needs Management 3 of 3 VA Talent Management System

External Events

- A learning activity outside of the organization, such as a college course
- External events allow a description and comment field to identify the nature of training

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Notes:

Slide 26: External Events

Learning Needs Management 3 of 3 VA Talent Management System

Record Learning-Multiple Tool

This tool can record learning events for multiple items for multiple users as long as the events you want to record are the same type.

Notes:

Slide 27: Record Learning-Multiple Tool

Learning Needs Management 3 of 3 VA Talent Management System

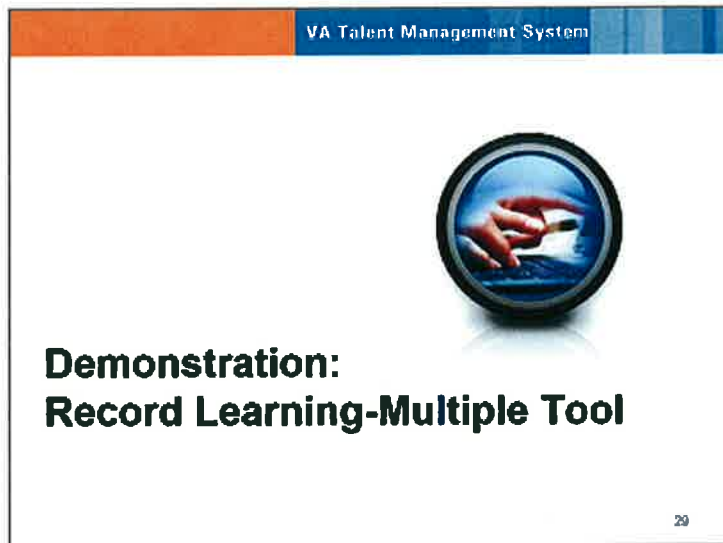
SCORM 2004 – Record Pass/Fail and Item Grade

- Record Pass/Fail and Item Grade based on content object setting are now extended to SCORM 2004 objects.
- The VA TMS will now record grades to the item learning event rather leaving them at the content level.

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Notes:

Slide 28: SCORM 2004 – Record Pass/Fail and Item Grade



Notes:

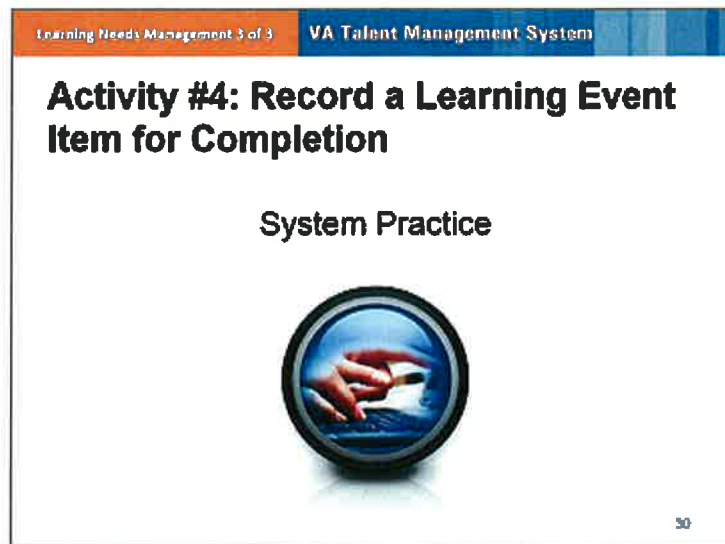
Slide 29: Demonstration: Record Learning-Multiple
Tool



Demonstration: Record Learning-Multiple Tool

You can access the tool in one of two ways:

1. Select **Record Learning – Multiple** from the **Quick Links** section on the Home page.
2. Navigate to **Users > Tools > Record Learning – Multiple**.



Notes:

Slide 30: Activity #4: Record a Learning Event Item for Completion

**Activity #4: Record a Learning Event Item for Completion**

1. Use one of the two ways from the previous demonstration to access the Record Learning-Multiple tool.
2. Select the **Item** radio button.
3. In the Search and Add Items section, enter the **Item Type ID**. Search for an **Item ID**, and select **Add** checkbox.
4. Select **Add**.

NOTE: You can also use the magnifying glass icon to search for and select the item.

5. Repeat steps 3–4 to add additional items.
6. In the Search and Add Users section, search for the **User ID**.
7. Select **Add**.

NOTE: You can also use the magnifying glass icon to search for and select the item.

8. Repeat steps 6–7 to add additional users.
9. Select **Next**.
10. In the Edit Details section, enter details for the item:
 - Completion date and time
 - Time Zone
 - Total hours, credit hours, learning hours, and training non-duty hours
11. Select the **More Options** icon to enter Instructor Name Comments. Select **Close**.
12. Select **Apply Changes** to make the changes apply to all users.
13. Select the **expand** icon.
14. If the details are different for each user, change the item details accordingly. Enter the completion date, time, and time zone for each user for the item.
15. If you modified the details for any user, select **Apply Changes** in the yellow section of the screen.
16. Repeat steps 10–15 for all other items.

NOTE: The other **Apply Changes** buttons (at the top and bottom of the Edit Details section) may be used if you want to enter the same completion status for all users for a particular item.

17. Select **Next**.
18. If competencies are to be assessed as a result of recording a learning event for these items, select one of the assessment options.

19. Select **Submit**.



The Job Aid: Record Learning is available in the VA TMS.

Learning Needs Management 3 of 3 VA Talent Management System

Activity #5: Record an External Learning Event Item

System Practice



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Notes:

Slide 31: Activity #5: Record a Learning Event Item for
External Event



Activity #5: Record an External Learning Event Item

1. Use one of the two ways shown in the previous demonstration to access the Record Learning-Multiple tool.
2. Select the **External Event** radio button.
3. In the Add External Events section, enter a description.
4. Select **Add**.
5. In the Search and Add Users section, enter the user ID.
6. Select **Add**.
7. Select **Next**.
8. In the Edit Details section, enter details for the item:
 - Completion date and time
 - Time Zone
 - Grade (if applicable)
 - Total hours, credit hours, learning hours, and training non-duty hours
9. Select the **More Options** icon to enter Instructor information and Comments.
10. Select **Apply Changes** to make the changes apply to all users.
11. Select **Next**.
12. Select **Submit**.

VA Talent Management System

Notes:

Admin side (User Record)

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Slide 32: Learning History

VA Talent Management System

Notes:

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Slide 33: Certificate of Completion

Learning Needs Management 3 of 4 VA Talent Management System

Learning Events Editor


- Learning events may be edited and files may be attached to records with Learning Event Editor tool
- Permissions required to edit or delete learning event records
- Admins can attach files to learning events, such as certificates, transcripts, or written tests, scanned to computer of admin making changes

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Notes:

Slide 34: Learning Event Editor

VA Talent Management System



Demonstration: Learning Events Editor

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Notes:

Slide 35: Demonstration: Learning Events Editor



Demonstration: Learning Events Editor

Steps: Users > Tools > Learning Event Editor (to show how to navigate to it while speaking to it)

An attachment framework is used to allow you to attach external documents to records in the VA TMS. For example, if a user completed a course that required a paper-based test at the end, the paper-based test could be digitized (scanned into a PDF or MSWord document using other means) and attached to the learning history record using the Learning Event Editor tool for future reference.

The attachment interface shows all attachments related to the entity. In addition, it allows for additions and removals of attachments. When you select the File Attachments link on the Summary tab of the record, you can browse for a file to attach to the record. It is recommended that you enter a description to identify each file more easily (you cannot modify a description after you upload the file). Select **Upload** to finish the attachment process.

File Attachment Interface

If you attempt to attach a file that is of an unsupported type, a validation error displays. If you attempt to attach a file that is larger in size than allowable, another similar validation error also displays.

File Attachment Validation Error

Users can access attached files in the user interface by reviewing the completed work details of the recorded item, and administrators can access the attached files in SuccessFactors Administration on the Learning History tab from the Related area of a user record.

Learning Needs Management 3 of 3

VA Talent Management System

Related Reports

Reports	Results
Learning Needs	Learning needs of users. Learning needs are learning items or curricula that the user needs to complete.
To-Do List	To-Do List of users. To-Do Lists are users' personal dockets of learning items and curricula.
Curriculum Status	Curriculum assigned to each user and the curriculum status, and if applicable, it also returns the number of days remaining before required retraining to keep the curriculum current.
Curriculum Item Status	Curriculum assigned to each user; Items assigned to each curriculum; & Completion/status dates

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Notes:

Slide 36: Related Reports

Learning Needs Management 3 of 3

VA Talent Management System

Related Reports

Reports	Results
Learning History	Users' learning histories (learning items and curricula they have finished) with detail item events.
Item Status	User's completion status for the items he or she participated in during the given date range (for each user and item).
Curriculum Item Status	Curriculum assigned to each user and his or her curriculum status, the items assigned to each curriculum and the completion date, completion status, and required date for each item, (for each user).

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Notes:


Slide 37: Related Reports

Learning Needs Management 3 of 3 VA Talent Management System

Knowledge Check

Are only "For Credit" Items displayed in a users Learning History (Completed Work)?

- a) True
- b) False



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Notes:


Slide 38: Knowledge Check

Learning Needs Management 3 of 3 VA Talent Management System

Knowledge Check

For which of the following may a learning event be recorded?

- a) Item
- b) External event
- c) Schedule block
- d) Scheduled offering
- e) All of the above



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Notes:


Slide 39: Knowledge Check

Learning Needs Management 3 of 3 VA Talent Management System

Knowledge Check

Users can edit their Learning History (Completed Work) record.

a) True
b) False



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Notes:

Slide 40: Knowledge Check

Learning Needs Management 3 of 3 VA Talent Management System

Evaluation & Self-Certification Reminder

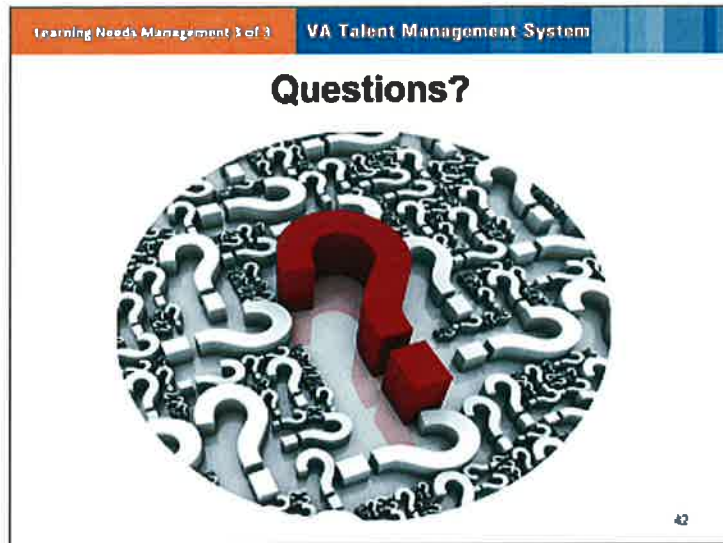
- You will be prompted to complete the Evaluation and then you can complete your Self-Certification for this session.
- Evaluations can be found on your To-Do List.



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Notes:

Slide 41: Evaluation & Self-Certification Reminder



Notes:

Slide 42: Questions?